



COUNTY OF SAN DIEGO  
**Great Government Through the General Management System – Quality, Timeliness, Value**  
DEPARTMENT OF HUMAN RESOURCES

CLASS SPECIFICATION

CLASSIFIED

COMPENSATION/SYSTEMS COORDINATOR

Class No. 002335

■ CLASSIFICATION PURPOSE

To supervise, oversee and perform work related to the administration of the Deferred Compensation Plan available to County employees; and to perform related work.

■ DISTINGUISHING CHARACTERISTICS

This is a one position professional level classification allocated only to the Treasurer-Tax Collector. Under direction of the Deputy Treasurer-Tax Collector for Administration and Support in the Treasurer-Tax Collector's office, the incumbent is responsible for overseeing the operations and administration of the County's Deferred Compensation Program, including the 457, 401 (a) and Terminal Pay Plans, as well as other plans that may be added in the future. This position requires daily public contact.

■ FUNCTIONS

**The examples of functions listed in the class specification are representative but not necessarily exhaustive or descriptive of any one position in the class. Management is not precluded from assigning other related functions not listed herein if such duties are a logical assignment for the position.**

Essential Functions:

1. Makes presentations to new and current employees.
2. Develops and implements strategies to increase participation and improve services.
3. Ensures enrollments, contribution changes, catch-up contributions, withdrawals, loans and rollovers are processed accurately and timely.
4. Coordinates educational seminars and outreach meetings.
5. Provides written/verbal information and assistance to participants.
6. Ensures that program materials, forms and information are current and up to date, including website information.
7. Coordinates presentations and services with providers and vendors.
8. Interfaces with the Auditor & Controller's Payroll Division and departmental Payroll Clerks to ensure proper processing of deductions and payouts.
9. Serves on the Deferred Compensation Committee.
10. Reviews and revises the Deferred Compensation Investment Policy Statement on an annual basis.
11. Participates in the annual review of investment selections.
12. Reviews performance of the Deferred Compensation providers, prepares reports for the Deferred Compensation Committee, and may oversee Request For Proposal's for new/alternative providers.
13. Provides courteous, high quality service to members of the public by personally responding to requests for service or appropriate referral.

■ KNOWLEDGE, SKILLS AND ABILITIES

Knowledge of:

- Federal and State of California rules and regulations pertaining to deferred compensation plans.

- General governmental accounting and bookkeeping principles and practices.
- Principles and techniques of presentation and group facilitation.
- The General Management System in principle and in practice.
- Principles and techniques of supervision.
- Telephone, office, and online etiquette.
- County customer service objectives and strategies.

Skills and Abilities to:

- Communicate effectively both orally and in writing.
- Supervise and train subordinate personnel.
- Reconcile account statements and records using personal computers and other office equipment.
- Prepare specific and general reports.
- Establish effective working relationships with County staff and outside institutions and agencies.
- Interpret financial reports and legal documents.
- Demonstrate verbal skills for public and classroom presentations.
- Communicate effectively with a variety of individuals representing diverse cultures and backgrounds and function calmly in diverse situations, which require a high degree of sensitivity, tact and diplomacy.
- Treat County employees, representatives of outside agencies and members of the public with courtesy and respect.
- Provide prompt, efficient and responsive service.
- Exercise appropriate judgment in answering questions and releasing information; analyze and project consequences of decisions and/or recommendations.

■ EDUCATION/EXPERIENCE

Education, training, and/or experience that demonstrate possession of the knowledge, skills and abilities listed above. An example of qualifying education/experience is: a bachelor's degree from an accredited college or university in finance, accounting, business administration or related field, AND three (3) years of professional level experience in any of the following areas: accounting, finance, financial analysis, investments, employee benefits, pensions, financial planning and/or retirement planning.

**Note:** Professional-level experience, may substitute for the education requirement on a year-for-year basis. Certified Financial Planner (CFP) or related certification is highly desirable.

■ ESSENTIAL PHYSICAL CHARACTERISTICS

**The physical characteristics described here are representative of those that must be met by an employee to successfully perform the essential functions of the classification. Reasonable accommodation may be made to enable an individual with qualified disabilities to perform the essential functions of a job, on a case-by-case basis.**

Continuous upward and downward flexion of the neck. Frequent: sitting, repetitive use of hands to operate computers, printers and copiers. Occasional: walking, standing, bending and twisting of neck, bending and twisting of waist, squatting, simple grasping, reaching above and below shoulder level, standing or sitting for prolonged periods of time, and lifting and carrying files weighing up to 10 pounds.

■ SPECIAL NOTES, LICENSES, OR REQUIREMENTS

License

A valid California class C driver's license, which must be maintained throughout employment in this class, is required at time of appointment, or the ability to arrange necessary and timely transportation for field travel. Employees in this class may be required to use their own vehicle.

Certification/Registration

None Required.

Working Conditions

Office environment; exposure to computer screens.

Background Investigation

Must have a reputation for honesty and trustworthiness. Misdemeanor and/or felony convictions may be disqualifying depending on type, number, severity, and recency. Prior to appointment, candidates will be subject to a background investigation.

Probationary Period

Incumbents appointed to permanent positions in this class shall serve a probationary period of 12 months (Civil Service Rule 4.2.5).

**New: September 28, 1984**  
**Revised: September 13, 1999**  
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**Reviewed: Spring 2004**  
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